



How Meticulosity Increased Profitability Using ServOps

Dave Ward, CEO and Founder, and Tanya Wigmore, CMO, at Meticulosity spent years running their full-service Web Development and Online Marketing Agency with a myriad of disconnected tools. The friction cost them a lot of time and money, and they believed that they had no other options. There was no one platform that could manage all of their client work. That was before they found out about Service Operations Automation and Accelo.

Key Challenges

With a wide range of e-commerce, web development, and digital marketing projects for enterprise-level clients, Meticulosity experienced more complex operational challenges than many other agencies. With three main offices across the world and a team that spans five time zones, the agency has doubled in size over the last few years to keep up with growing demand.

As they became a true full-service agency, their business model shifted. Previously, clients fit into one of two categories: E-commerce Web Development (managed on Teamwork), or Inbound Marketing, but the business pivoted and clients were increasingly becoming intertwined as development and marketing teams worked closely and interchangeably on larger projects.

Accelo's flexibility allows us to support projects, retainers, and a number of other ways we work with our clients. Now, we have a lot more visibility on what's happening in the agency and our profitability.

Challenge:

As Meticulosity grew and doubled in size, they struggled to scale their business. The company relied on a dozen of disparate tools and lacked transparency into client projects, costing them endless amounts of time and money.

Solution:

Meticulosity discovered Accelo's powerful and flexible ServOps solution. They instantly gained insights and visibility into their team's schedules, client work, budgets, and profitability with Accelo's automated dashboards.

Results:

Today, Meticulosity manages their client work seamlessly and is able to automatically track the time they bill for. Accelo helped cut down the amount of time spent on admin work, so Meticulosity can focus on clients and increasing profitability.



"Accelo is the best of both worlds: product planning and profitability."

Tanya Wigmore
Chief Marketing Officer
Meticulosity

In the past, the two teams effectively operated like two separate businesses, using two different systems to manage work. With the evolution of the business came a requirement to merge the two systems in order to fully service their clients' needs, as the lack of a single, integrated project management platform would no longer be an option.

In addition to working together better in production, the team at Meticulosity needed a way to bridge the gap between proposal and project, making the onboarding process seamless and connecting the promises in sales with the outcomes in production.

Approach

After discovering Service Operations Automation (ServOps) at HubSpot's INBOUND conference in 2017, Meticulosity realized there was a new category of technology they could use to run their business. After an extensive evaluation process, Meticulosity moved forward with Accelo. Tanya, the CMO, was the first on-board with ServOps and now utilizes Accelo the most out of the whole team.

Moving to one platform to run their service operations was monumental. "We tried lots of systems and Accelo has really revolutionized our company" explains Dave. Today, every

client lives on Accelo, regardless of the deliverables. Having the space to oversee clients that are working with the Web Development team and/or the Marketing team has saved the team numerous wasted hours and unnecessary headaches. Plus, project tracking in one platform has allowed the executive team to see which clients are the most profitable and which team members are best suited for certain projects.

"Accelo is the best of both worlds: product planning and profitability," Tanya said, "It's been fabulous, and no other platform could do everything in one place"

Moreover, the Team Scheduling tool has significantly improved their ability to connect internally and gain greater visibility into workflows. Regarding productivity, Tanya says "Accelo provided a window to where time is being spent, which is really important when you're a service based company." Managers are aware of who is at capacity with their workload, and they feel confident of the work that is happening at all times.

The Results

Today, using ServOps, Meticulosity tracks their work and manages projects seamlessly. They're organized; they utilize Retainers and Projects, the Outlook integration, and Team Scheduling to stay on top of the work they bill for, sync up with their

co-workers, and increase overall profitability.

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Across departments and time zones, everyone is on the same page. They've incorporated Accelo's Template feature to standardize processes and cut down the amount of the time being spent on administrative work.

Most notably, through the Outlook integration, client correspondence is kept in one place. This feature is a true game changer because no details are lost, ever. Plus, the ServOps email integration and time tracking provide insight into how long internal and external communications are taking.

Increase your business efficiencies, eliminate unnecessary administrative costs, and maximize your cash flow.

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